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Overview

The Clinic Maintenance functionality in Rio allows users to create and update Clinics. Access to the functionality is restricted because users will have the ability to amend all Clinics at BCHC, not just the ones relating to their Team or Service

Each Clinic consists of three parts:

The 'Clinic' which defines the Team and Location of the Clinic

The 'Session' which defines the Dates, Times and Frequency of the Clinic

The 'Stream' which defines the Number and Type of appointment slots in the Clinic

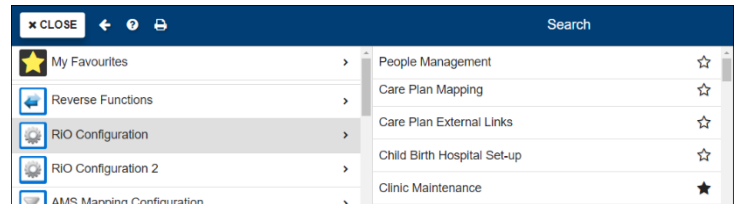
Clinics may have one Stream or may contain multiple Streams if there are several HCPs working in the Clinic at the same time



Creating a Clinic

Before creating a Clinic, ensure you know the location, day(s) and time(s) the Clinic will be taking place; the type & duration of the appointments and the details of the HCPs who will be seeing Clients in the Clinic

- Click **MENU**
- Click **Rio Configuration** (left column)
- Click **Clinic Maintenance** (middle column)



The **Clinic Maintenance** screen will display. Existing Clinics will display in a list on the left of the screen

- Scroll down to bottom of the list of Clinics
- Click **Add New Clinic**



The **New Clinic Template** screen will display

- **Clinic ID:** Enter unique Clinic identifier
- **Description:** Enter Clinic code (Obtain Code from own Service or Service Support Team)
- **Team Clinic:** Select if required

☒ BCHC Clinics are usually Team Clinics. If you tick the tick box, it will make the 'Team' field mandatory and automatically associates all staff in the selected team with the Clinic

☐ Leaving the Team Clinic tick box unticked makes the 'Clinic Type' field mandatory

Clinics must be associated with a Team or Clinic Type

- **Team:** Select required team name if Team Clinic field is checked
- **Clinic Type:** Select required clinic type if Team Clinic field is unchecked
- **Location:** Select required location from list
- **Clinic Group:** Select if required (this field may auto-complete)

Selecting a Clinic Group allows you to create a group for reporting purposes

- **Care Setting:** Select as required
- **Lead HCP:** Select required Lead HCP if Team Clinic field is unchecked
- **Comment:** Complete if required

The comment will display on Clinic List View for every Clinic date

- **Deleted:** Leave unticked (ticking will close the Clinic)



- **Referral Required:** Select if required

☒ BCHC clinics usually require the Client to have a Referral to the team before they can have an appointment booked

☐ Leaving the Referral Required tick box unticked means Client appointments can be booked without the Client having a Referral to the team

- **Interactive Worksheet:** Select if required, only available if Team Clinic is selected

☒ Inserts link to IWS at the top of the Clinic screen

- **Young Persons Clinic:** Select if required

☒ Tick if Clinic is a designated 'Young Persons' Clinic for reporting purposes

- **Exclude Bank Holidays:** Select if required

☒ Prevents appointments being booked on a Bank Holiday

- **Allow Unsche'd Attendances:** Select if required

☒ Inserts Ad-hoc link to the HCP Diary at the top of the Clinic screen

- **Allow Second Arrival Time:** Select if required

☒ Inserts an additional Arrival time column, can be used for large Clinics with multiple receptions

- **Allow Rebooking Prompt:** Complete if required

☒ If the appointment is cancelled a 'Rebooking' prompt will display

- **Printing Method:** Select as required (Normally select Server & Client)

Server = To a pre-defined printer e.g. Synertec Client = Locally configured printer

- **Minimum Slot Length:** Complete as required

This is the shortest length of appointment, selecting 5 mins allows for ease of appointment alteration

- **Accept Spine Caseload (e-Ref):** Leave blank -Not currently used at BCHC

- **Publish Lead HCP to e-Referral:** Leave blank -Not currently used at BCHC

You will now need to scroll down to view the additional sections

Appointment Types

- Click the **Add** button

The **Add Appointment Types** dialogue box will display

- Select each Appointment Type required ☒
- Click the **Add** button



Team Access

This will auto complete if ☒ Team Clinic is selected

If Team Clinic is **not** selected:

- Click the **Add** button
- The **Add Teams** dialogue box will display
- Select Team(s) required ☒
- Click the **Add** button

Additional Users

This section is usually left blank, but would display staff who are not already part of the selected team(s) that have been added to the clinic

Activities

This section is usually left unchanged but would automatically add the selected activity(s) to every booked appointment. If an activity is ticked and removed it will not appear on the Outcome screen

Letter Template

Complete if required. Letter Template associates specific letters when booking an appointment

- Click the **Add** button
- The **Add Letter Template** dialogue box will display
- Select the **Template Description & Document Type** from the drop-down lists
- Click the **Plus** button  to add multiple letter templates (if required)
- Click the **Add** button when all templates have been added

Reschedule Letter Template

Complete if required. Reschedule Letter Template associates specific letters when rescheduling an appointment

- Click the **Add** button
- The **Add Letter Template** dialogue box will display
- Select the **Template Description & Document Type** from the drop-down lists
- Click the **Plus** button  to add multiple reschedule letter templates (if required)
- Click the **Add** button



Cancellation Letter Template

Complete if required. Cancellation Letter Template associates specific letters when Cancelling an appointment

- Click the **Add** button
- The **Add Letter Template** dialogue box will display
- Select the **Template Description & Document Type** from the drop-down lists
- Click the **Plus** button  to add multiple cancellation letter templates (if required)
- Click the **Add** button

Key Definition

The pre-defined colours are used Trust wide, **DO NOT amend**

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

The Clinic will display in alphabetical order in the list on the left of the screen

You now need to add the Session(s) and Stream(s) to the Clinic



Adding a Session

Once the Clinic has been created you need to add the Session information, this will define the dates, times and frequency the Clinic will operate

You will need to display the Clinic Maintenance screen

- Click **MENU**
- Click **Rio Configuration** (left column)
- Click **Clinic Maintenance** (middle column)

The **Clinic Maintenance** screen will display

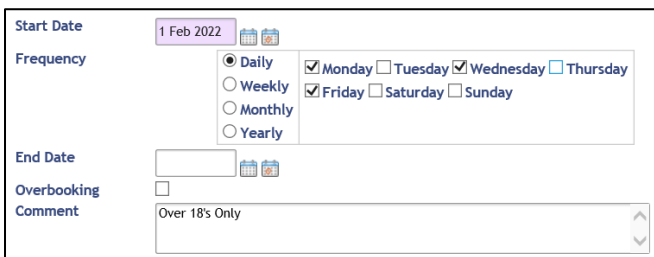
- Locate the required Clinic (on left of screen)
- Click the **Plus** symbol  to the left of the Clinic name

The **Add Session** option will display below the Clinic

- Click **Add Session**

The **New Session** screen will display

- **Start Date:** Enter the date the Clinic will start to operate
- **Frequency:** Enter when the Clinic will operate
- **End Date:** Complete if required (last day of Clinic)
- **Overbooking:** Tick if required
- ☒ Allows additional appointments to be booked at the beginning or end of a Clinic
- **Comment:** Config. use only as the comment will not display on the Clinic screen
- Click **Save**



The screenshot shows the 'New Session' form with the following details:

- Start Date:** 1 Feb 2022 (with a calendar icon)
- Frequency:** Radio buttons for Daily (selected), Weekly, Monthly, and Yearly. To the right are checkboxes for days of the week: Monday (checked), Tuesday, Wednesday (checked), Thursday, Friday (checked), Saturday, and Sunday.
- End Date:** A date input field with a calendar icon.
- Overbooking:** An unchecked checkbox.
- Comment:** A text area containing 'Over 18's Only'.

The **Save Complete** prompt will display

- Click **Close**

The Session will display below the Clinic on the left of the screen

You will now need to add the Stream(s) to the Clinic



Adding a Stream

Once a Clinic and Session have been built you need to create the Stream(s) to add appointment slots and clinicians/rooms into the Clinic

You will need to display the Clinic Maintenance screen

- Click **MENU**
- Click **Rio Configuration** (left column)
- Click **Clinic Maintenance** (middle column)

The **Clinic Maintenance** screen will display

- Locate the required Clinic (on left of screen)
- Click the **Plus** symbol  to the left of the Clinic name
- Locate the required Session
- Click the **Plus** symbol  to the left of the Session name

The **Add Stream** option will display below the Session

- Click **Add Stream**

The **New Stream** screen will display

- **Stream Description:** Enter clinician's name / room etc. as required

This is the label which will display at the top of the Clinic

- **Referral Required:** Auto completes from what is selected in the Clinic build
- **Stream Closed:** ☐ Leave unticked (☒ to close the Stream)

Stream Sections

Stream Sections is where you add **slots** into the Clinic. It is useful for you to have a note of the times, durations, types, and order of slots before you start to build the Stream

For example, a Clinic stream starts at 09:00 and ends at 12:00

It has 2 x 1 hour First Appointments (09:00-10:00 & 10:00-11:00)

And 2 x 30 minute Follow Up Appointments (11:00-11:30 & 11:30-12:00)

As you are building the slots in the Stream, make sure you scroll all the way to the right to view and complete all the information

Clinic Maintenance



- **Start Date & Time:** Enter the Stream start date and the start time of the first slot

The start date will auto populate from the Session build, with a time 00:00, update the time to the start time for the slot(s)

e.g. 2 x 1 hour First Appointments (**09:00**-10:00 & 10:00-11:00), start time would be 09:00

- **End Date:** Leave blank (or enter date to end the Session)

- **End Time:** Enter the end time of the slot(s)

e.g. 2 x 1 hour First Appointments (09:00-10:00 & 10:00-**11:00**), end time would be 11:00

- **Length:** Select as required
- **Appointment Type:** Select as required
- **Activity:** Leave blank (selecting an activity will add it to every appointment)
- **F2F:** Leave blank
- **Location:** Select if required
- **Consultation Medium** Select if required
- **Colour:** Do not amend
- **Visual Indicator:** Leave blank
- **Check box:** ☐ leave unticked (selects the row)
- Click the **Add** button, if multiple appointment types need to added

Repeat above process for each Stream section (slot type) required

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

Stream Description Jenny Jones									
Referral Required ☒									
Stream Closed ☐									
Stream Sections									
Start Date and Time	End Date	End Time	Length	Appointment Type	HCP	Activity	F2F	Location	
21 Aug 2023 12:00		14:00	30 minutes	FU-F2F Consultat		Please Select	☐	RiO Health Centre	☐
21 Aug 2023 14:00		17:00	1 hour	First-F2F Consult		Please Select	☐	RiO Health Centre	☐
Add Copy Remove Maintain HCPs Immunisations and Health Reviews									

Copy

The Copy button will allow you to copy the Stream section

- Place a **tick** at the end of the row ☒ of the Stream section/slot type you want to duplicate
- Click **Copy**



The copied section will display below the one selected

- **Adjust** the Start Time, End Time, Length, Appointment Type etc.
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

The new section will display in time order

Remove

The Remove button allows you to remove a Stream section

- Place a **tick** at the end of the row ☒ of the Stream section/slot type you want to remove
- Click **Remove**

The removed section will no longer display

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

Maintain HCPs

The Maintain HCPs button allows you to associate specified HCP(s) to the selected Stream section. This functionality limits the available HCPs who are able to have appointments booked in the Clinic

- Place a **tick** at the end of the row ☒ of the Stream section/slot type you want to add an HCP
- Click **Maintain HCPs**
- **HCP:** Select as required
- **HCP Start date:** Complete as required
- Click **Save**
- Click **Accept Changes & Close**

The HCP name will display in the HCP column

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

Maintain e-Referral

Not currently used at BCHC

Immunisations and Health Reviews

Not currently used at BCHC



Frozen Slot Time

A **Frozen Slot** is a period of the Clinic when you don't want to have appointments booked and is typically used, for example, to 'freeze' 12:30-13:00 to allow HCPs to take a lunch break

Only pre-existing slot times can be 'frozen'. If you are adding or removing a Frozen Slot to an existing Clinic, the clinic **MUST** be locked before editing

Adding a Frozen Slot

- Click the **Add** button
- **Start Time:** Enter required time
- **End Time:** Enter required time
- **Frozen Reason:** Select required reason
- Click **Save**

The **Save Complete** prompt will display

Start Time	End Time	Frozen Reason
12:00	13:00	Break

Buttons: Add, Remove

- Click **Close**

The Frozen Slot will now display below the existing Stream Sections

Removing a Frozen Slot

- Ensure the **required** Clinic, Session & **Stream** are displaying
- Locate the **Frozen Slot Time** you want to remove
- Place a **tick** ☒ at the end of the row
- Click **Remove**

The Frozen Slot will no longer display

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**



Locking and Unlocking Clinics

Before a Clinic, Session or Stream are edited they must be Locked. This will prevent anybody from booking, amending or cancelling appointments in the Clinic 'front end' while editing

You will need to display the Clinic Maintenance screen

- Click **MENU**
- Click **Rio Configuration** (left column)
- Click **Clinic Maintenance** (middle column)

The **Clinic Maintenance** screen will display

Locking a Clinic

- Locate the required Clinic (on left of screen)
- Click **on** the Clinic name
- Place a tick in the **Lock Clinic for Editing** checkbox ☒ (bottom left of screen)

Lock Clinic for Editing	☒
Show Closed Clinics	☐
Show Closed Sessions	☐
Show Closed Streams	☐

The screen will refresh and **(Locked)** will display to the right of the clinic name

You can now continue to edit the clinic, session or stream as required

If a member of staff tries to book, amend or cancel an appointment whilst the clinic is locked they will see a prompt telling them the clinic is locked and they are unable to save changes

Unlocking a Clinic

Ensure the **Clinic Maintenance** screen is displayed

- Locate the **(Locked)** clinic in the list on the left of the screen
- Click to **select** the clinic
- Remove the tick in the **Lock Clinic for Editing** checkbox ☐ (bottom left of screen)

The screen will refresh, and the clinic will now be **unlocked**



Editing a Clinic, Session or Stream

Once a Clinic, Session or Stream has been created most fields can be edited

It is not possible to edit the Clinic ID, Team Clinic or Clinic Type for a clinic; if this needs to be amended, the clinic must be ended and a new clinic created

If there are any booked appointments in a clinic stream, then these will need to be rescheduled or cancelled prior to the stream section being edited or deleted

- Click **MENU**
- Click **Rio Configuration** (left column)
- Click **Clinic Maintenance** (middle column)

The **Clinic Maintenance** screen will display

- Locate **required Clinic** (on left of screen)
- Click the **Clinic name**
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the Clinic name now displays as **(Locked)**
- **Select** the required Clinic, Session or Stream
- **Amend** the Clinic, Session or Stream as required
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the Clinic (see Unlocking a Clinic)



End Dating Stream Sections

If a stream is no longer operating, it can be ended/closed without having to close the clinic or session.

All appointments booked in the stream must be outcomed, cancelled or rescheduled before closing the stream

It is therefore advisable that a closure (End) date is entered in the stream section(s) well in advance. The stream section slots will not display in the clinic past the End date, avoiding the need to cancel or move appointments

You will need to display the **Clinic Maintenance** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- Locate the required clinic (on left of screen)
- Click to **select** the clinic
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the clinic name now displays as **(Locked)**
- **Select** the required clinic, session and stream
- Locate the required **stream section(s)**
- **End Date:** Complete as required
- **End Time:** Complete as required
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the clinic (see Unlocking a Clinic)

Once the **End Date(s)** have passed the stream can be closed

If you attempt to end date a stream section which appointments after the End Date, the **'appointments will be moved to the scratch pad if you choose to continue'** Appointment Warning prompt will display, asking if **'you want to continue?'**

- Click **No**



- Proceed to outcome, cancel, or reschedule any booked appointments **before** ending the stream section

Clicking 'Yes' will move the appointments to the scratchpad

This option is not recommended; however, if this option is selected it is advisable to make a list of dates and times of client appointments which need to be rescheduled from the scratch pad **before** clicking 'Yes'

Closing a Stream

- Open the **Clinic Maintenance** screen and select the required clinic (on left of screen)
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the clinic name now displays as **(Locked)**
- **Select** the required session and **stream**
- Place a tick in the **Stream Closed** ☒ check box
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the clinic (see Unlocking a Clinic)

The stream will no longer display below the session

If you attempt to close a stream which contains booked appointments, the '**appointments will be moved to the scratch pad if you choose to continue**' Appointment Warning prompt will display, asking if '**you want to continue?**'

- Click **No**
- Proceed to outcome, cancel or reschedule any booked appointments before closing the stream

Clicking 'Yes' will move the appointments to the scratchpad

This option is not recommended; however, if this option is selected it is advisable to make a list of dates and times of client appointments which need to be rescheduled from the scratch pad **before** clicking 'Yes'



End Dating and Closing Sessions

If a session is no longer operating, it can be closed without having to close the clinic. Closing a session will automatically close all associated streams

You will be unable to close a session which contains streams with booked appointments. All booked appointments will need to be outcomed, cancelled or rescheduled before the session can be closed

You will need to display the Clinic Maintenance screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- Locate the required clinic (on left of screen)
- Click to **select** the clinic
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the clinic name now displays as **(Locked)**
- **Select** the required clinic and session
- **End Date:** Complete as required
- **Comment:** Enter reason for ending the session e.g., no longer operating
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the clinic (see Unlocking a Clinic)

The session and associated streams will no longer display below the clinic



Closing a Clinic

If a clinic is no longer operating, it can be closed; closing a clinic will automatically close all associated sessions and streams

You will be unable to close a clinic which contains streams with booked appointments. All booked appointments will need to be outcomed, cancelled or rescheduled before the clinic can be closed

You will need to display the **Clinic Maintenance** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- Locate the required clinic (on left of screen)
- Click to **select** the clinic
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the clinic name now displays as **(Locked)**
- **Select** the required clinic
- **Deleted:** ☒ place a tick in the Deleted check box
- **Comment:** Enter reason for ending closing the clinic e.g., no longer operating
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the clinic (see Unlocking a Clinic)

The Clinic will no longer display in the Clinic list



Viewing Closed Clinics, Sessions & Streams

To view a closed clinic, session or stream, you will need to display the **Clinic Maintenance** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- For **closed sessions** or **streams**, locate and select the **clinic first**

Below the **Lock Clinic for Editing** check box are three other checkboxes:

Show Closed Clinics ☐

Show Closed Sessions ☐

Show Closed Streams ☐

Lock Clinic for Editing	☐
Show Closed Clinics	☐
Show Closed Sessions	☐
Show Closed Streams	☐

- Place a tick in the required check box(s) ☒

The screen will refresh and **(Closed)** will display to the right of the clinic, session or stream name

☒ Early Years (Closed)	
☐ Add New Clinic	
Lock Clinic for Editing	☐
Show Closed Clinics	☒
Show Closed Sessions	☐
Show Closed Streams	☐



Re-Opening a Closed Clinic, Session or Stream

A clinic, session or stream can be re-opened if required, you will need to display the **Clinic Maintenance** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- Place a tick in the Show Closed Clinics, Sessions or Streams checkbox ☒ as required

The screen will refresh

- Locate the required (Closed) clinic, session or stream in the list on the left of the screen

Clinics

- **Deleted:** ☐ **remove** the tick in the **Deleted** check box

Sessions

- **End Date:** **Remove the End Date**

Streams

- **Stream Closed** ☐ **remove** the tick in the **Stream Closed** check box

Stream Sections

- **End Date:** **Remove the End Date**

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

The screen will refresh and the re-opened clinic, session or stream will display in the clinic list on the left of the screen



Creating a Clinic Template

Once a clinic has been created, it can be saved as a template and used to create other clinics.

This is a quick way of creating similar clinics, you will still need to add sessions and streams to the clinic

You will need to display the **Clinic Maintenance** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Maintenance**

The **Clinic Maintenance** screen will display

- Locate the required clinic (on left of screen)
- Click to **select** the clinic
- **Lock** the Clinic for Editing (see Locking a Clinic)
- Check that the clinic name now displays as **(Locked)**
- Click the **Save As Template** button (bottom)

The **Save as Template** dialogue box will display

- **Template Name:** Complete as required
- **Template Description:** Complete as required
- Click **Save**

The **Save Complete** prompt will display

- Click **Close**
- **Unlock** the clinic (see Unlocking a Clinic)



Creating a Clinic from a Template

Once a Template has been created, it can be used to create a clinic

You will need to display the **Clinic Template List** screen

- Open the **Menu**
- In the left column, click **Rio Configuration**
- In the central column, click **Clinic Setup Templates**

The **Clinic Template List** screen will display

- Locate the required clinic template
- Click the blue **Action** button  (far right)
- Click **Create Clinic**

The clinic information will be pre-populated with the information saved in the template.

- **Clinic ID:** Enter unique clinic identifier
- **Description:** Enter clinic code (Obtain Code from own Service or Service Support Team)

Update the remainder of the information as/if required as per the **Creating a Clinic** (page 2) section of this quick reference guide

- Click **Save**

The **Save Complete** prompt will display

- Click **Close**

The **Clinic Template List** screen will display. You will need to display the **Clinic Maintenance** screen to check that the clinic has been created successfully

- Click the **Clinic Maintenance** link (bottom middle)
- Locate the clinic in the clinic list

Once the clinic has been created, you need to add sessions and streams as per the **Adding a Session** (page 6) and **Adding a Stream** (page 7) sections of this quick reference guide.



Clinic Rules

Clinic

- ✓ Always follow the **Naming Convention** for all new Clinics created using Service ID and description e.g. PODI (Podiatry)
- ✓ The **Service ID** will need to be obtained from the Service Support Team:
bchc.servicesupport@nhs.net
- ✓ Only use Delete (Close) if a Clinic ceases to operate immediately and all past appointments have been Outcomed
- ✓ Choose the appropriate slot length to allow appointment slots to be booked in multiples e.g. 5, 10, 30, 60 minutes
- ✓ Always select **Referral Required**
- ✓ **Do not amend colours**, these are pre-set for BCHC

Session

- ✓ Ensure the **correct Clinic** is **selected** prior to making changes to the session
- ✓ Ensure the **Clinic is locked** prior to making changes, all staff have been informed and no-one is using the Clinic
- ✓ If **ending** a Session, **Outcome all appointments** prior to entering an **end date**
- ✓ The **end date** should be **after the last appointment** in the Session e.g. If the last appointment is 17.00 on a Friday, the end date should be Saturday's date
- ✓ Once a Session is end dated this will automatically end any associated Streams
- ✓ **Ensure the Clinic is unlocked once Session amendments have been made.** If the Clinic is not unlocked, no-one will be able to book appointments

Stream

- ✓ Ensure the **correct Clinic** is **selected** prior to making changes to the Stream
- ✓ Ensure the **Clinic is locked** prior to making changes, all staff have been informed and no-one is using the Clinic
- ✓ If **ending** a Stream, **Outcome all appointments** prior to entering an **end date**
- ✓ The **end date** should be **after the last appointment** in the Stream e.g. If the last appointment is 17.00 on a Friday, the end date should be Saturday's date
- ✓ Once the **end date has passed**, tick **Stream Closed** ☒ so that the Stream is **removed** from the list and **appointments cannot be booked**
- ✓ **Ensure the Clinic is unlocked once Stream amendments have been made.** If the Clinic is not unlocked, no-one will be able to book appointments